

Purchasing Quick Tips:

- Expedite the closing of all “OPEN” and fully received Purchase Orders
 - Forward all invoices to Accounts Payable
- Creating Change Orders (purpose, steps and attachment)
 - If the Purchase Order has a remaining balance and no further payments are necessary, a Change Order should be created to bring the Purchase Order obligated amount to the amount expended
 - Notify the Office of Purchasing for PO approval
 - Complete and attach the On-Line PO Change Order Purchasing Approval Request Form to the PO
 - Benefits of creating a Change Order
 - PO Balance Report displays the actual expenditures
 - Unexpended funds are returned from the PO to the Contract
 - Unexpended funds released from PO obligation and made available in the agency budget
- Closing a Purchase Order
 - What qualifies a PO to be closed; obligated amount equals amount expended and all line items are fully received against
 - First ensure that all vouchers referring the PO have been paid
 - Do not close POs that have a remaining balance and will be needed to make payment(s) in the next fiscal year
- Canceling a Purchase Order
 - PO should be Canceled, if never received or vouchered against
 - PO should be reduced and closed otherwise
- POs that require roll over to new fiscal year
 - Goods and/or service not received in time for payment processing, will require the obligation to roll over to next fiscal year budget
 - POs that roll over to the fiscal year must have sufficient funds encumbered to cover the cost of the goods and/or services that have been ordered
 - Do not de-commit funds below the amount that has been ordered
- eProcurement Requisition with DENIED status
 - If a Requisition has been DENIED, the Requester will receive an email notification from Core
 - If you are unable to open the link to the Denial Comments due to your security settings you can check the Denial Comments by:
 - Main Menu > Core-Financials > eProcurement > Manage Requisitions > Click the Clear Box > Enter the Requisition number including the preceding 0s in the Requisition ID box > Click Search > Click the Check in the Select Action box > Select View Approvals> Click Go >Click on the View/Hide Comments link in the red Denied box

- Review the Comments and determine the course of action; cancel or correct requisition to move it back into the Approval Workflow
- CANCEL requisition by adding Comments to indicate reason for cancelation:
 - Main Menu > Core-Financials > eProcurement > Manage Requisitions > Click the Clear Box > Enter the Requisition number including the preceding zeros (0) in the Requisition ID box > Click Search > Click the Check in the Select Action box > Select Edit Requisition> Click Go >Click the More Comments link > If you need another box click on the + > Add comments to indicate reason for canceling the Requisition > Click OK > Click on Save & Submit
 - Cancel Requisition steps:
Main Menu > Core-Financials > eProcurement > Manage Requisitions > Click the Clear Box > Enter the Requisition number including the preceding zeros (0) in the Requisition ID box > Click Search > Click the Check in the Select Action box > Select Cancel
- CORRECT and move back into the Approval Workflow by:
 - Changes requested by the Approver MUST be made to the Requisition by navigating through your Worklist to Main Menu > Core-Financials > Worklist > Worklist Details > Click on the Requisition > edit the Requisition as requested by the Approver > Click Save & Submit
 - Check to confirm Requisition moved back into the Approval Workflow by navigating to Main Menu > Core-Financials > eProcurement > Manage Requisitions > Click the Clear Box > Enter the Requisition number including the preceding zeros (0) in the Requisition ID box > Click Search >Status should show as Pending
- If Requisition status is still Denied, perform work-around, navigate to:
 - Main Menu > Core-Financials > eProcurement > Manage Requisitions > Click the Clear Box > Enter the Requisition number including the preceding Zeros (0) in the Requisition ID box > Click Search > Click the Check in the Select Action box > Select Edit Requisition> Click Go > Increase the quantity of an item by 1 > Save & Submit
 - Main Menu > Core-Financials > eProcurement > Manage Requisitions > Click the Clear Box > Enter the Requisition number including the preceding zeros (0) in the Requisition ID box > Click Search > Click the Check in the Select Action box > Select Edit Requisition> Click Go > Decrease the same item quantity of an item by 1 > Save & Submit
- Then check to confirm requisition moved back into the Approval Workflow as detailed above
- eProcurement Requisition with HOLD status
 - If a Requisition has been placed on HOLD, the Requester will receive an email notification from Core
 - If you are unable to open the link to the HOLD Comments due to your security settings you can check the HOLD Comments by:
 - Main Menu > Core-Financials > eProcurement > Manage Requisitions > Click the Clear Box > Enter the Requisition number including the preceding zeros (0) in the Requisition ID box > Click Search > Click the Check in the Select Action box >

Select View Approvals> Click Go >Click on the View/Hide Comments link in the pink HOLD box

- Review the Comments and determine the course of action, **cancel** or **correct** requisition to move it back into the Approval Workflow
- CANCEL Requisition by adding Comments to indicate reason for cancellation:
 - Main Menu > Core-Financials > eProcurement > Manage Requisitions > Click the Clear Box > Enter the Requisition number including the preceding zeros (0) in the Requisition ID box > Click Search > Click the Check in the Select Action box > Select Edit Requisition> Click Go >Click the More Comments link > If you need another box click on the + > Add comments to indicate reason for canceling the Requisition > Click OK > Click on Save & Submit
 - Cancel Requisition steps:
Main Menu > Core-Financials > eProcurement > Manage Requisitions > Click the Clear Box > Enter the Requisition number including the preceding zeros (0) in the Requisition ID box > Click Search > Click the Check in the Select Action box > Select Cancel
- CORRECT Requisitions and move back into the Approval Workflow by:
 - Main Menu > Core-Financials > eProcurement > Manage Requisitions > Click the Clear Box > Enter the Requisition number including the preceding zeros (0) in the Requisition ID box > Click Search > Click the Check in the Select Action box > Select Edit Requisition> Click Go >Edit the requisition as requested by the Approver > Click on Save & Submit
 - Contact/send an email to the Approver indicating the changes made to the Requisition (currently the CoreCT automatic notification does not work)
- Purchase Order or CHANGE ORDER with **DENIED** status
 - If a Purchase Order/Change Order has been DENIED, the Buyer will receive an email notification from Core
 - If you are unable to open the link to the Denial Comments due to your security settings you can check the Denial Comments by:
 - Main Menu > Core-Financials > Purchasing > Purchase Orders > Add/Update POs > Find An Existing Value > Enter the Purchase Order/Change Order number including the preceding zeros (0) in the PO ID box > Click Search > Click the View Approvals link > Click on the View/Hide Comments link in the red Denied box
 - Review the Comments and determine the course of action; **cancel** or **correct** the Purchase Order/Change Order to move it back into the Approval Workflow
 - CANCEL Purchase Order/Change Order by adding Comments to indicate reason for cancellation:
 - CORRECT Purchase Order/Change Order and move back into the Approval Workflow by:
 - Main Menu > Core-Financials > Purchasing > Purchase Orders > Add/Update POs > Find An Existing Value > Enter the Purchase Order/Change Order number including the preceding zeros (0) in the PO ID box > Click Search > Click the View Approvals link > Click on the View/Hide Comments link in the red Denied box
 - Notify Purchasing via email of correction (presently the CoreCT automatic notification does not work)
- Purchase Order or CHANGE ORDER with **HOLD** status

- Main Menu > Core-Financials > Purchasing > Purchase Orders > Add/Update POs > Find An Existing Value > Enter the Purchase Order/Change Order number including the preceding zeros (0) in the PO ID box > Click Search > Click the View Approvals link > Click on the View/Hide Comments link in the red Denied box
- Contact/send an email to the Approver indicating the changes made to the PO (currently the CoreCT automatic notification does not work)